



Solar on Multifamily
Affordable Housing



SOMAH
**Semiannual
Progress Report**

Reporting period
January 1, 2020 – June 30, 2020



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1. Executive Summary

The Solar on Multifamily Affordable Housing (SOMAH) program provides financial incentives for installing photovoltaic (PV) energy systems on multifamily affordable housing. The program is designed to deliver clean power and credits on energy bills to hundreds of thousands of California's affordable housing residents. The program was prompted by California Assembly Bill 693, authored by Assemblymember Susan Talamantes Eggman (D-Stockton) and signed by Governor Jerry Brown in 2015. Each solar project is required to provide direct economic benefits to tenants, allocate at least 51% of the clean energy produced to tenants in the form of virtual net energy metering credits and provide job training opportunities.

The SOMAH program serves utility and community choice aggregator customers in the territories of Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), Liberty Utilities Company and PacifiCorp. Funded through greenhouse gas (GHG) allowance auction proceeds, SOMAH has a program budget of up to \$100 million annually for 10 years and an overall target to install at least 300 megawatts (MW) of generating capacity by 2030.

The program is designed to be transparent and accountable to the communities it serves. It is administered by a team of nonprofit organizations that provide a host of no-cost services to maximize participation and community benefit. These services include comprehensive technical assistance for property owners and contractors, tenant education resources and job training opportunities. A community advisory council provides input into program implementation and helps ensure the program maximizes benefits to the communities it is designed to serve.

The SOMAH program began accepting applications on July 1, 2019. At the close of year one, PG&E, SCE, PacifiCorp and Liberty territories have available funding and are accepting applications. As of August 20, 2019, the SOMAH Program Administrator (PA) closed the waitlist for the SDG&E territory to avoid excessive wait times for future funding cycles. Additional funding was made available for SDG&E in February 2020 to move a portion of applications off the waitlist, but the SDG&E waitlist remains closed at this time.

1.1 COVID-19 Acknowledgement

The COVID-19 public health crisis, and the SOMAH PA's response, impacted numerous areas of the program. This report highlights and discusses these impacts in conjunction with providing standard updates on key program areas. With much of this reporting period affected by the impacts of the COVID-19 public health crisis, the SOMAH PA would like to acknowledge the impacts to SOMAH participants, stakeholders and the solar industry. While some of these impacts have been felt already, the SOMAH PA understands that industry impacts will continue for some time and is actively



encouraging participants to provide feedback on the barriers and impacts that they are facing. The SOMAH PA maintains a dedicated webpage, CalSOMAH.org/COVID19, to provide the most up-to-date program information and resources on this topic. The SOMAH PA remains committed to prioritizing health and safety during this time, while working to advance the goals of the SOMAH program and build a resilient California.

2. Background

Assembly Bill (AB) 693 (Stats. 2015, Ch. 582) created the Multifamily Affordable Housing Solar Roofs Program, funded at up to \$100 million annually from the share of GHG allowance auction proceeds allocated to each investor-owned utility (IOU). Senate Bill (SB) 92 (Stats. 2017, Ch. 26), adopted with the 2017-18 State Budget, further clarified the budget for the program. Decision (D.)17-12-022 (effective Dec. 14, 2017) implemented AB 693 and changed the name of the program to the Solar n Multifamily Affordable Housing (SOMAH) program to distinguish it from other state clean energy and low-income solar programs. D.17-12-022 established the program's budget, incentive structure and eligibility policies, among other items.

The SOMAH program is jointly administered by the Association for Energy Affordability, Center for Sustainable Energy® and GRID Alternatives, in collaboration with the California Housing Partnership and Rising Sun Energy Center. The SOMAH program is overseen by the California Public Utilities Commission (CPUC).

2.1 Application Pathways: Track A and Track B

The SOMAH program is designed to accommodate participation at varying stages of a solar PV installation, ranging from initial property owner engagement and assessment of a property's solar installation capacity, to projects whose contractor has already been selected or installations are underway or recently completed. There are two tracks to apply for a SOMAH incentive: Track A and Track B. The SOMAH PA designed the program with two incentive track choices to tailor the user experience based on the stage of a project, i.e., whether the program participant is just starting their journey with going solar, has a shovel-ready project or has recently completed the installation. Both



tracks provide fixed, capacity-based incentives for qualifying solar energy systems, using the Expected Performance Based Buydown (EPBB)¹ methodology.

Track A is designed for property owners, operators or other host customers who receive direct program marketing and outreach from the SOMAH PA and its network of community-based organization (CBO) partners. Track A provides upfront technical assistance (TA) services for property owners to supply them with a well-rounded understanding of their property's energy needs and the educational, technical and financial resources that are available to facilitate valuable energy efficiency upgrades and a solar installation. Participants that select Track A will have their incentive funding earmarked for the duration of the three-month upfront TA period, prior to a reservation request. Track A participants typically do not have an identified contractor and are guided through a multiple bid process to select an eligible solar contractor for their project.

Track B is designed for host customers who receive direct program marketing and outreach from an eligible contractor, project developer or similar entity. Projects in this track have already identified an eligible solar contractor who has already performed or will provide the client assessment and design services that may include a solar site assessment, initial design, financing options review, contract review, etc. Projects that select Track B are not eligible for upfront TA and may waive the requirement to participate in the multiple bid process by submitting the Multiple Bid Waiver with the reservation request package. Instead of upfront TA, Track B projects are eligible for standard TA, which is further described in Section 3.4. For Track A and B projects, incentive funding will be reserved for 18 months based on the date the Reservation Approval Notice is issued.

The following figure shows the application steps for Track A and Track B.

¹ EPBB incentives are based on the system's capacity and design, which provide an estimate of the system's future performance.



Figure 1 – Track A and Track B Application Steps



2.2 Eligibility Options: Qualification Option A—Low-Income and Qualification Option B—Disadvantaged Communities

Regardless of the application track selected, properties can qualify for the SOMAH program in one or both ways, known as Qualification Option A and Qualification Option B. A property may be eligible for SOMAH by meeting the requirements of Option A, Option B or both. All properties must be at least five units and meet the definition of deed-restricted, affordable housing in P.U. Code 2852(A)(3)(a)(i) and also meet Qualification Option A or B. Qualification Option A refers to properties in which at least 80% of the units are reserved for households at or below 60% of the area median income (AMI); and Qualification Option B refers to properties that are located in a disadvantaged community² (DAC) as identified by the CalEnviroScreen and CalEPA. Section 3.1.1, Applications and Incentive Statistics further elaborates on each type of the qualification options for the SOMAH program.

2.3 Program Budget

SOMAH has a program budget of up to \$100 million annually, with at least 90% of the funds allocated to incentives and up to 10% allocated to the administrative budget. To

² Disadvantaged communities for the SOMAH program are currently defined as census tracts scoring in the top 25% statewide on the [CalEnviroScreen 3.0 map](#). Properties located in one of 22 additional census tracts that are in the top five percent of pollution burden but that do not have an overall CalEnviroScreen score because of unreliable socioeconomic data are also eligible.



ensure transparency for program stakeholders, the SOMAH PA compiles and submits a Semiannual Expense Report (SAER). The SAER tracks expenditures by category, totaling program incentives and administration expenses incurred by the SOMAH PA, CPUC Energy Division (ED) and the IOUs. The SAER is posted twice a year to the California Distributed Generation Statistics [website](#) in conjunction with this Semiannual Progress Report.

2.3.1 Program Administrative Budget

The administrative budget is shared by the SOMAH PA, the CPUC ED and the IOUs. The SOMAH PA tracks the program expenses in four main categories: SOMAH PA Admin; Marketing, Education & Outreach (ME&O); Technical Assistance; and Workforce Development. Figure 2 provides a snapshot from the SAER and outlines total program administrative expenditures through June 30, 2020.

Figure 2 – Total Program Administrative Expenditures by Category

Total Expenditures by Category

| Category | |
|--|-----------------|
| Investor-Owned Utility (IOU) Expenses | \$2,018,210.00 |
| SOMAH California Public Utilities Commission (CPUC) Expenditures | \$155,338.75 |
| SOMAH Marketing, Education & Outreach (ME&O) | \$3,191,663.02 |
| SOMAH Program Admin | \$7,261,666.27 |
| SOMAH Technical Assistance | \$341,455.50 |
| SOMAH Workforce Development | \$539,812.95 |
| Grand Total | \$13,508,146.49 |

More detailed expenditure information can be found at https://www.californiadgstats.ca.gov/programs/#_subsection_17.

2.3.2 Program Incentive Budget

The SOMAH PA publishes updated program incentive budget information for each IOU territory to the California Distributed Generation Statistics [website](#) on a weekly basis. Because each IOU territory's annual incentive budget varies based on their specific GHG allowance auction proceeds, the SOMAH PA maintains five individual reservation queues and up to five waitlist queues. Collections for each funding cycle are expected to be available between December and February, and the funds for each utility territory may be released at different times. Collections are based on each utility's Energy Resource Recovery Account (ERRA) or Energy Cost Adjustment Clause (ECAC). The 2019/2020 SOMAH program funds were released for PG&E, SCE and SDG&E in Q1 2020, allowing for an additional \$123,248,397 of incentive funds for the program across the three territories. Funding for 2019/2020 incentive budgets in Liberty and PacifiCorp



territories was released in late Q2 2020, with \$164,842 allocated for Liberty and \$895,140 for PacifiCorp. PG&E also released their quarterly funding at the end of June 2020, resulting in an additional \$7,016,068 in incentive funds for the territory. Figure 3 summarizes the committed and remaining budget for the SOMAH program.



Figure 3 – Project Capacity and Budget

| | | Waitlist | | Earmarked | | Pending Reservation | | Reserved | | Completed | | Application Totals | | Total Budget (\$) | Remaining Budget (\$) |
|-------------------|---------|---------------|-------------|---------------|-------------|---------------------|-------------|---------------|-------------|---------------|-------------|--------------------|-------------|-------------------|-----------------------|
| | | Capacity (MW) | Budget (\$) | Capacity (MW) | Budget (\$) | Capacity (MW) | Budget (\$) | Capacity (MW) | Budget (\$) | Capacity (MW) | Budget (\$) | Capacity (MW) | Budget (\$) | | |
| PG&E | Track A | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.000 | 0 | 93,340,526 | 1,135,596 |
| | Track B | 4.565 | 11,211,728 | 0 | 0 | 38.306 | 84,157,192 | 3.570 | 8,047,738 | 0 | 0 | 41.876 | 92,204,930 | | |
| | Total | 4.565 | 11,211,728 | 0 | 0 | 38.306 | 84,157,192 | 3.570 | 8,047,738 | 0 | 0 | 41.876 | 92,204,930 | | |
| SCE | Track A | 0 | 0 | 0.375 | 1,201,290 | 0.000 | 0 | 0 | 0 | 0 | 0 | 0.375 | 1,201,290 | 108,436,185 | 32,098,545 |
| | Track B | 0 | 0 | 0 | 0 | 31.115 | 71,273,641 | 1.957 | 3,862,709 | 0 | 0 | 33.072 | 75,136,350 | | |
| | Total | 0 | 0 | 0.375 | 1,201,290 | 31.115 | 71,273,641 | 1.957 | 3,862,709 | 0 | 0 | 33.447 | 76,337,640 | | |
| SDG&E | Track A | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.000 | 0 | 25,670,559 | 2,578,923 |
| | Track B | 2.637 | 5,771,937 | 0 | 0 | 9.328 | 21,517,605 | 0.781 | 1,574,031 | 0 | 0 | 10.109 | 23,091,636 | | |
| | Total | 2.637 | 5,771,937 | 0 | 0 | 9.328 | 21,517,605 | 0.781 | 1,574,031 | 0 | 0 | 10.109 | 23,091,636 | | |
| PacifiCorp | Track A | 0 | 0 | 0 | 0 | 0.000 | 0 | 0 | 0 | 0 | 0 | 0.000 | 0 | 1,743,854 | 1,460,361 |
| | Track B | 0 | 0 | 0 | 0 | 0.149 | 283,493 | 0 | 0 | 0 | 0 | 0.149 | 283,493 | | |
| | Total | 0 | 0 | 0 | 0 | 0.149 | 283,493 | 0 | 0 | 0 | 0 | 0.149 | 283,493 | | |
| Liberty Utilities | Track A | 0 | 0 | 0 | 0 | 0.000 | 0 | 0 | 0 | 0 | 0 | 0.000 | 0 | 1,124,990 | 661,478 |
| | Track B | 0 | 0 | 0 | 0 | 0.223 | 463,512 | 0 | 0 | 0 | 0 | 0.223 | 463,512 | | |
| | Total | 0 | 0 | 0 | 0 | 0.223 | 463,512 | 0 | 0 | 0 | 0 | 0.223 | 463,512 | | |
| TOTAL | Track A | 0 | 0 | 0.375 | 1,201,290 | 0.000 | 0 | 0 | 0 | 0 | 0 | 0.375 | 1,201,290 | 230,316,114 | 37,934,903 |
| | Track B | 7.202 | 16,983,665 | 0 | 0 | 79.121 | 177,695,443 | 6.309 | 13,484,478 | 0 | 0 | 85.429 | 191,179,921 | | |
| | Total | 7.202 | 16,983,665 | 0.375 | 1,201,290 | 79.121 | 177,695,443 | 6.309 | 13,484,478 | 0 | 0 | 85.804 | 192,381,211 | | |



Figure 4 summarizes the program dollars collected by fiscal year to date and identifies application totals and available program funds.

Figure 4 – Cumulative Program Budget

| | 2016/2017 Budget (\$) | 2017/2018 Budget (\$) | 2018/2019 Budget (\$) | 2019/2020 Budget (\$) | Application Totals (\$) | Total Budget (\$) | Remaining Budget (\$) |
|-------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|------------------------------------|------------------------------|----------------------------------|
| PG&E | 1,740,991 | 4,359,110 | 39,330,000 | 47,910,425 | 92,204,930 | 93,340,526 | 1,135,596 |
| SCE | 2,733,250 | 4,536,250 | 35,213,204 | 65,953,481 | 76,337,640 | 108,436,185 | 32,098,545 |
| SDG&E | 0 | 0 | 9,270,000 | 16,400,559 | 23,091,636 | 25,670,559 | 2,578,923 |
| PacifiCorp | 748,303 | 995,551 | TBD | TBD | 283,493 | 1,743,854 | 1,460,361 |
| Liberty Utilities | 132,440 | 258,328 | 314,705 | 419,517 | 463,512 | 1,124,990 | 661,478 |
| TOTAL | 5,354,984 | 10,149,239 | 84,127,909 | 130,683,982 | 192,381,211 | 230,316,114 | 37,934,903 |



3. Program Progress – Key Performance Areas

The overall SOMAH program budget is allocated between incentive budgets and administrative budgets. The SOMAH PA administrative budget is further divided into four categories: Program Administration, ME&O, Workforce Development and Technical Assistance. The following sections describe progress to date and notable metrics in each of the four categories.

3.1 Program Administration

The SOMAH program opened on July 1, 2019, which included the opening of the online application database (PowerClerk) for application submissions, launching the online bidding tool and commencing the publication of program statistics through the SOMAH Incentive Budget Report and SOMAH Working Data Set on the California Distributed Generation Statistics [website](#). This reporting period marks one year of the SOMAH program being open.

3.1.1 Applications and Incentive Statistics

With the addition of 2019/2020 incentive funds for PG&E, SCE and SDG&E territories released in Q1, the SOMAH PA was able to clear the waitlists for PG&E and SCE, as well as move a substantial number of applications off the SDG&E waitlist. When funding is exhausted for a specific IOU territory, a waitlist is created and projects are added to it until more funding becomes available. Projects are then moved off the waitlist in the order they are received. The Q1 release of 2019/2020 funding resulted in a reduction in the total number of waitlisted applications across territories from 183 to 15 during this reporting period. These additional projects that entered application review are now included in key program metrics, such as the eligibility criteria and DAC verification, as well as system sizing and percent allocation of VNEM credits to tenants.

Figure 5 – Application Status by IOU Territory

| Program | Active | Waitlist | Canceled/ Withdrawn | Complete/ Incentive Paid |
|-----------------|--------|----------|------------------------|-----------------------------|
| PG&E | 208 | 0 | 16 | 0 |
| SCE | 138 | 0 | 21 | 0 |
| SDG&E | 31 | 15 | 5 | 0 |
| Liberty Utility | 2 | 0 | 0 | 0 |
| PacifiCorp | 1 | 0 | 0 | 0 |



To avoid excessive wait times and project dropouts, the SDG&E waitlist was closed in August 2019 and remains closed given the volume of waitlisted applications. Applicants can check the status of their waitlisted application(s) and their position on the waitlist through weekly updates on CalSOMAH.org. Any incentive funds that become available through the course of application review, for example if an adjustment is made to system size and incentive amount after receiving utility data from the IOU, are applied to waitlisted projects through an ongoing reconciliation process by the PA. Similarly, the SOMAH PA maintains a buffer in each territory's budget to accommodate potential increases in system size and incentive amount as a result of utility data from the IOU, anticipated future load additions, solar sizing tool recommendations or other reasons.

Total Number of Applications

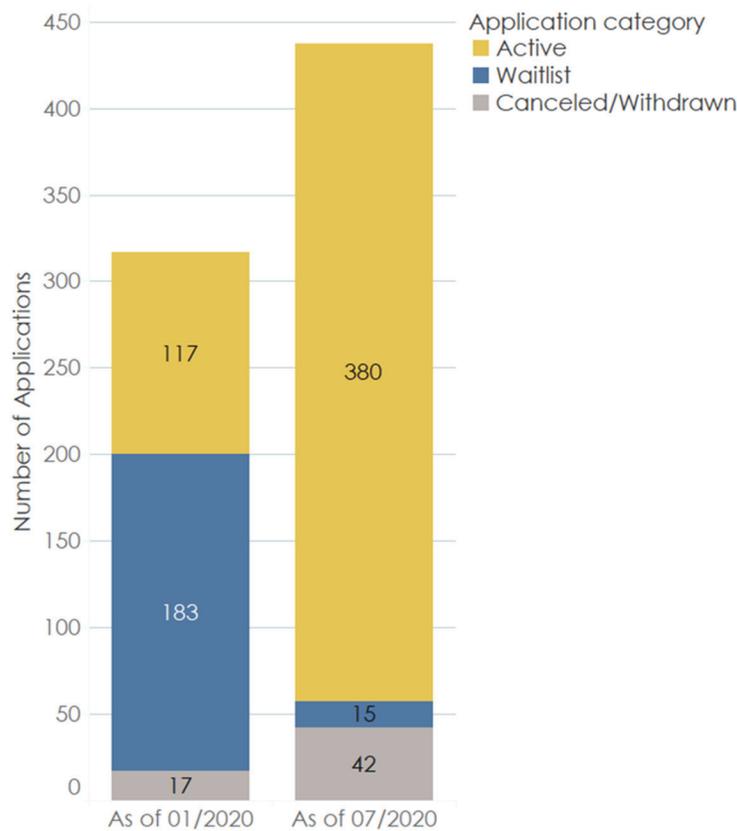


Figure 6 – Cumulative Applications Received

Between January and June 2020, the SOMAH program received 120 new applications in PG&E, SCE and Liberty territories. No new applications were received for PacifiCorp, and the SDG&E territory remained closed to new applications due to the extensive waitlist. The biggest influx of applications occurred at the end of June, before the year-one incentive step-down³ became effective July 1, 2020, when 80 applications were submitted within the span of a few days.

The first half of 2020 was dominated by the impacts of the

³ D.17-12-022 (p.43) requires the PA to reduce incentive levels "by the annual percent decline in residential solar costs as reflected by NREL reports, or 5% annually, whichever is less." The year two incentive levels have been reduced by 5% from the year one incentive levels, additional information can be found at CalSOMAH.org.



COVID-19 public health crisis. As cases spread throughout the United States in February and March, California implemented shelter-in-place orders that greatly impacted the ability of program participants and solar contractors to move projects forward. While the ripple effects of these restrictions aimed at safeguarding vulnerable populations have been felt throughout the economy, they have specifically impacted the ability of SOMAH applicants to achieve certain project milestones. In response, the SOMAH PA granted applications a 60-day extension for deadlines issued between March 17 and June 14, 2020. Effective June 15, 2020, new application deadlines were reverted to the typical program timelines. This temporary 60-day extension provided participants additional time to manage their individual projects and portfolios and did not impact the 18-month reservation period as required by the program handbook.

During this time, the SOMAH PA solicited feedback from participating contractors to better understand the challenges and barriers they are facing as a result of COVID-19. While new projects were still submitted to the program, the PA noticed that most projects utilized the additional time provided with the 60-day extension and did not actively submit corrections in the typical 14- to 20-day timeframe.

One of the data points collected during the Reservation Request (RR) Milestone is the project's construction start date or projected construction start date. Not all applications have filled in the construction start date yet, and applicants are asked to update this information at each application milestone. Below is a table of the construction timeline information reported in applications thus far.

Figure 7 – Construction Timeline Insights

| Date | Construction has Commenced | Projected Construction Start Date |
|---------|----------------------------|-----------------------------------|
| 2018 | 6 | 0 |
| 2019 | 7 | 1 |
| Q1 2020 | 1 | 11 |
| Q2 2020 | 0 | 122 |
| Q3 2020 | 0 | 59 |
| Q4 2020 | 0 | 89 |
| 2021 | 0 | 9 |

The projected start dates are expected to fluctuate as projects progress and are better able to forecast project timelines with more certainty. Whereas most applications



submitted upon program launch indicated a construction start date of Q2 2020, the SOMAH PA anticipates that these start dates will likely continue to shift toward starting construction in Q3 and potentially Q4 2020. Additional and updated information will be available in subsequent progress reports. As more projects progress from Reservation Request to the Energy Efficiency Compliance (EEC) Milestone, projects will be prompted to update their construction start date or projected start date.

California's COVID-19 response is continually evolving, with a phased reopening in May, but tighter restrictions being re-imposed in July. The SOMAH PA will continue to work closely with program stakeholders to understand the impacts of these restrictions on project timelines and respond appropriately.

Figure 8 – Applications by Incentive Track

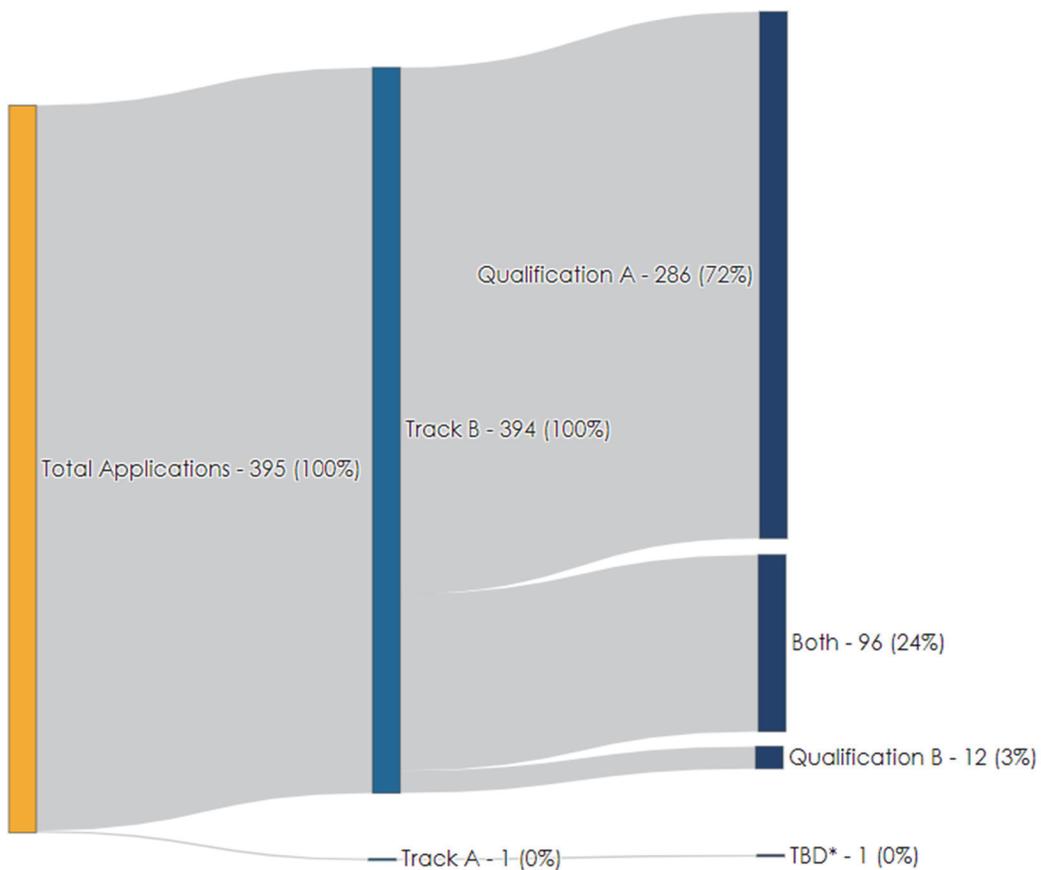
| Assigned Incentive Track | Active | Waitlist | Canceled/Withdrawn | Complete/Incentive Paid |
|--------------------------|--------|----------|--------------------|-------------------------|
| Track A | 1 | 0 | 7 | 0 |
| Track B | 379 | 15 | 35 | 0 |

One additional Track A project was submitted during this reporting period, joining the prior group of Track A projects that were submitted in late 2019 for upfront technical assistance (TA). Technical assistance and the Track A projects are further discussed in Section 3.4, Technical Assistance, and the majority of applications received continues to be Track B projects. The SOMAH PA attributes the high amount of Track B applications to pent-up program demand created from previously closed waitlists of the predecessor program, the Multifamily Affordable Solar Housing (MASH) program and the delay of the SOMAH program launch. An important focus of the 2020 SOMAH marketing, education and outreach (ME&O) plan is targeted ME&O efforts to help increase the level of participation for Track A applications in 2020 and in future years of the program through property owner outreach and engagement. While a specific target for Track A applications was not set for the 2020 ME&O plan, the SOMAH PA is looking to increase the balance between Track A and Track B applications to help increase the diversity of eligible property owners participating in the program and provide an opportunity for smaller affordable housing providers that may not normally engage with the program without the benefit of upfront TA.

Figure 9 shows the breakdown between application track and eligibility pathways during this period of performance.

- **Qualification Option A:** 80% of property residents have incomes at or below 60% of the area median income as determined by the Department of Housing and Community Development.
- **Qualification Option B:** The property is located in a disadvantaged community (DAC) as identified by the California Environmental Protection Agency.
- **Both:** The property meets the requirement of 80% of property residents having incomes at or below 60% of the area median income and is located in a DAC.

Figure 9 – Property Eligibility by Incentive Track





Of the 395 active applications⁴ received, 72% qualified for the program through Qualification Option A, 3% qualified for the program through Qualification Option B, and 24% qualified for the program through both Qualification Option A and Qualification Option B. One project has not yet designated their eligibility pathway due to it being a Track A application that will have this information recorded during the Reservation Request Milestone. Waitlisted applications are held in the waitlist status (categorized as Pending Reservation Approval) and not reviewed until funding becomes available to move them off the waitlist. As a result, the waitlist applications have not had their project information vetted or confirmed, including their property eligibility qualification.

Figure 10 further breaks down the property eligibility statuses by count and percentage to highlight the number of DAC qualifying properties.⁵

Figure 10 – Property Eligibility by Application Status

Applications by Property Eligibility

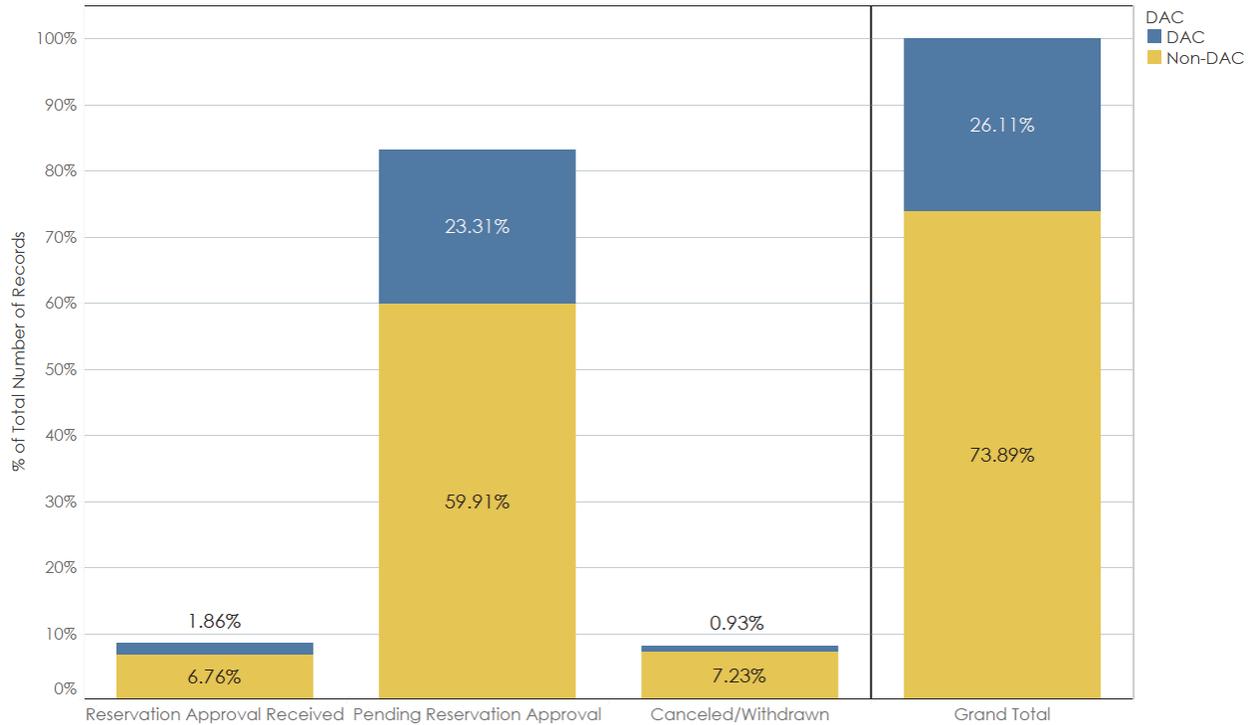
| Property Eligibility | Reservation Approval Received | Pending Reservation Approval | Canceled/Withdrawn |
|---|-------------------------------|------------------------------|--------------------|
| 80% of property residents have incomes at or below 60% of the area median income as determined by the Department of Housing and Community Development | 29 | 257 | 31 |
| Both A and B | 8 | 88 | 2 |
| The property is located in a disadvantaged community as identified by the California Environmental Protection Agency. | 0 | 12 | 2 |

⁴ Active applications are considered applications submitted that are have not been canceled or withdrawn. This figure includes waitlisted applications as well.

⁵ DACs are not distributed evenly across the IOU territories. The percentage of census tracts that are DACs in each IOU territory varies, along with the overlap of eligible properties in a DAC by each IOU territory. The PA does not know of any properties located in DACs in Liberty Utility or PacifiCorp territories.



Applications by Property Eligibility



Reservation Request Package Review

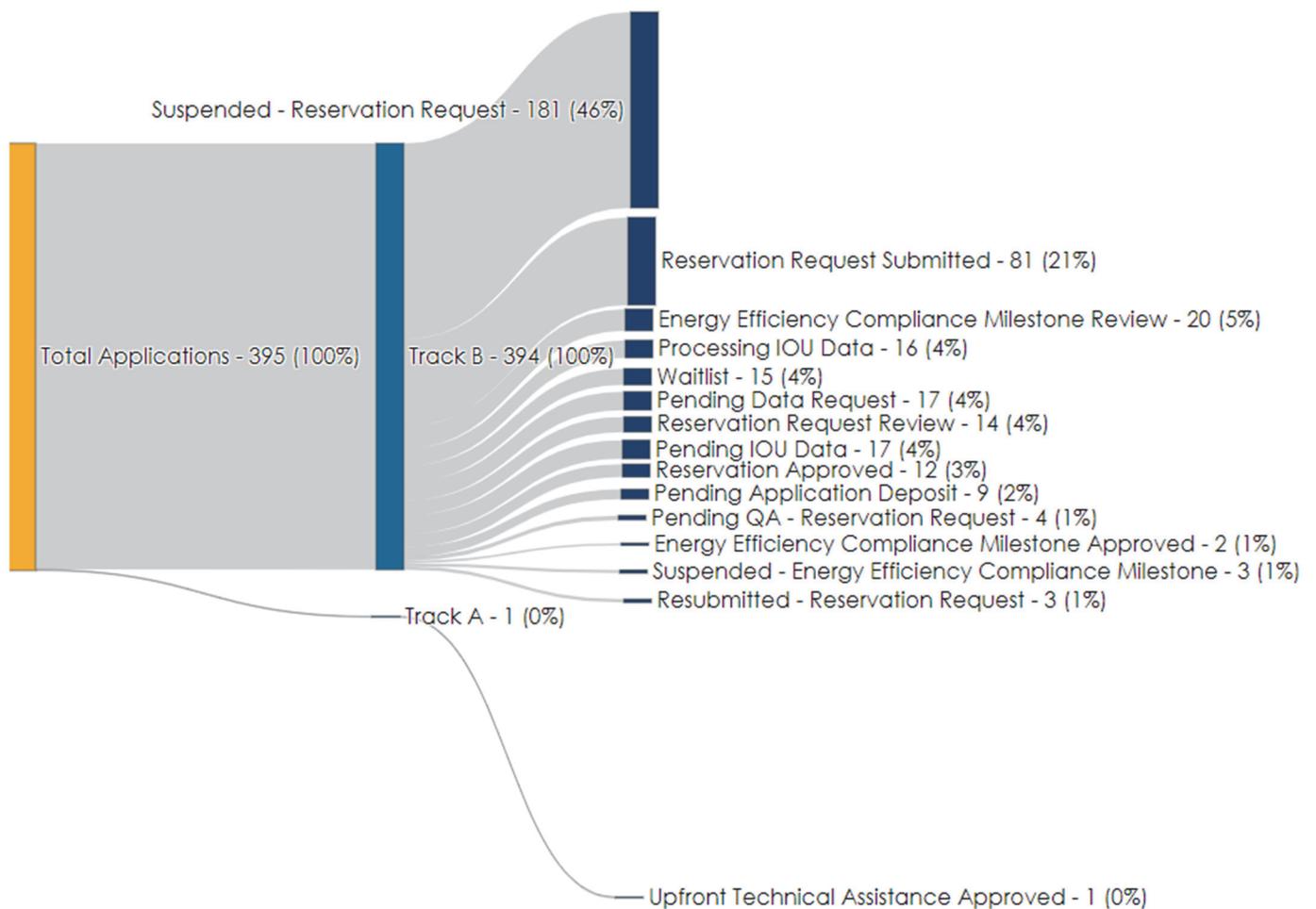
The Reservation Request Milestone is the first step of the application process for Track B projects. The reservation request package is a robust and important milestone to complete for all projects, with up to eight required documents and an application deposit before achieving reservation approval. The SOMAH PA reviews the required documents to ensure eligibility and compliance with program requirements. The number of projects with reservation approvals increased from five to 37 during this reporting period with nine close behind pending application deposits. In this reporting period, the SOMAH PA implemented an electronic payment option for application deposits—a process efficiency that has been well received by program participants. Of the 46 projects that have submitted their application deposit, 44 of those payments were completed via electronic payment. Without having to rely on physical delivery, and reducing the administrative steps to process physical checks, this has been a particularly useful option with the COVID-19 crisis to provide less touch points for the host customer, applicant and SOMAH PA team.

Amidst the impacts of COVID-19, the SOMAH program was able to continue with application processing without interruptions. Processing efforts for this reporting period



saw 32 new projects advance to Approved Reservation and two projects advance to Energy Efficiency Compliance Milestone Approved. These two points of approval represent completion of the first and second milestones of SOMAH's four-milestone application process. The Reservation Request and Energy Efficiency Compliance Milestones are also important steps in determining the eligible system size, as they consider consumption history and available energy efficiency upgrades.

Figure 11 – Application Status by Incentive Track



See Appendix A for a full list of application statuses and descriptions.

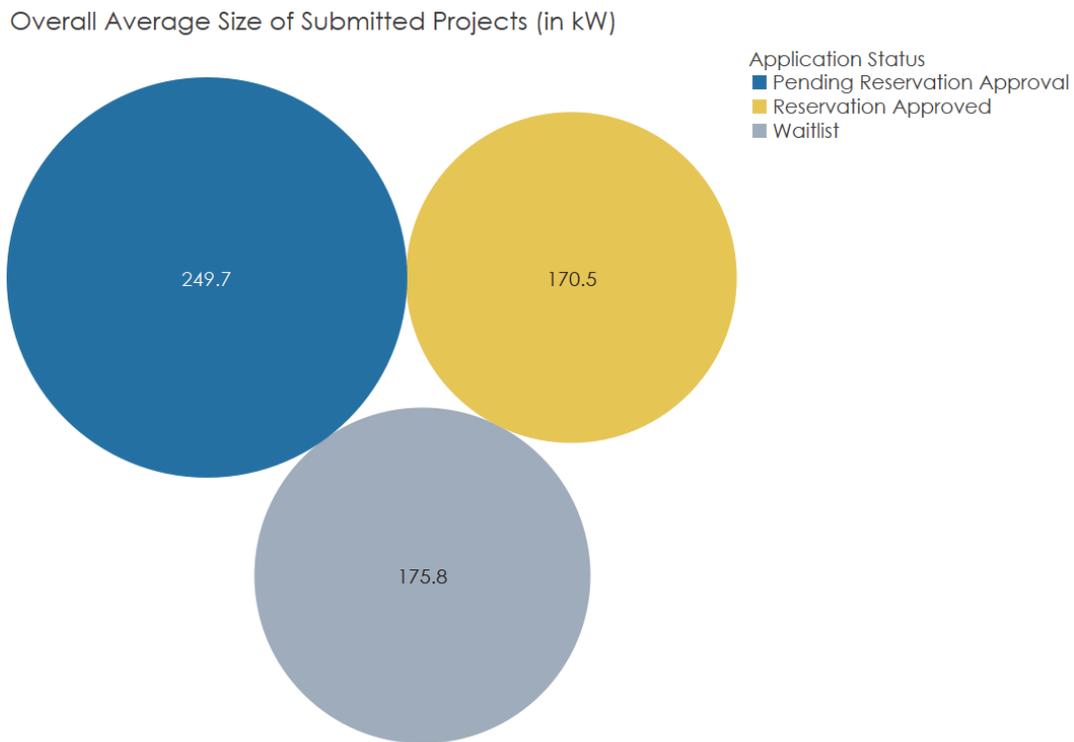
System size validation through IOU data requests for aggregated annual electrical consumption history is a key step of the reservation request prior to approval. The figures



below outline system size statistics for the average and largest projects across the IOU territories. Of the projects submitted thus far, the average system cost is \$4.08/watt⁶ with a total expected aggregate annual output of 164,353,818 kWh.⁷

Figure 12 – System Size Statistics for Submitted Projects

Average System Size (CEC-AC kW)⁸



⁶ Project costs are not considered verified until review of the installation contract and associated costs at the Proof of Project Milestone. The numbers used in this average are estimates reported for the projects currently in queue and are likely to fluctuate in future reporting periods.

⁷ Expected aggregated annual output is an estimate based off the PV equipment and system configuration specifications currently listed for applications in PowerClerk. This figure is subject to change based on updated system designs for projects in queue. System components and configuration are not verified until the onsite inspection at the Incentive Claim Milestone, which directly impact the expected output of the PV system.

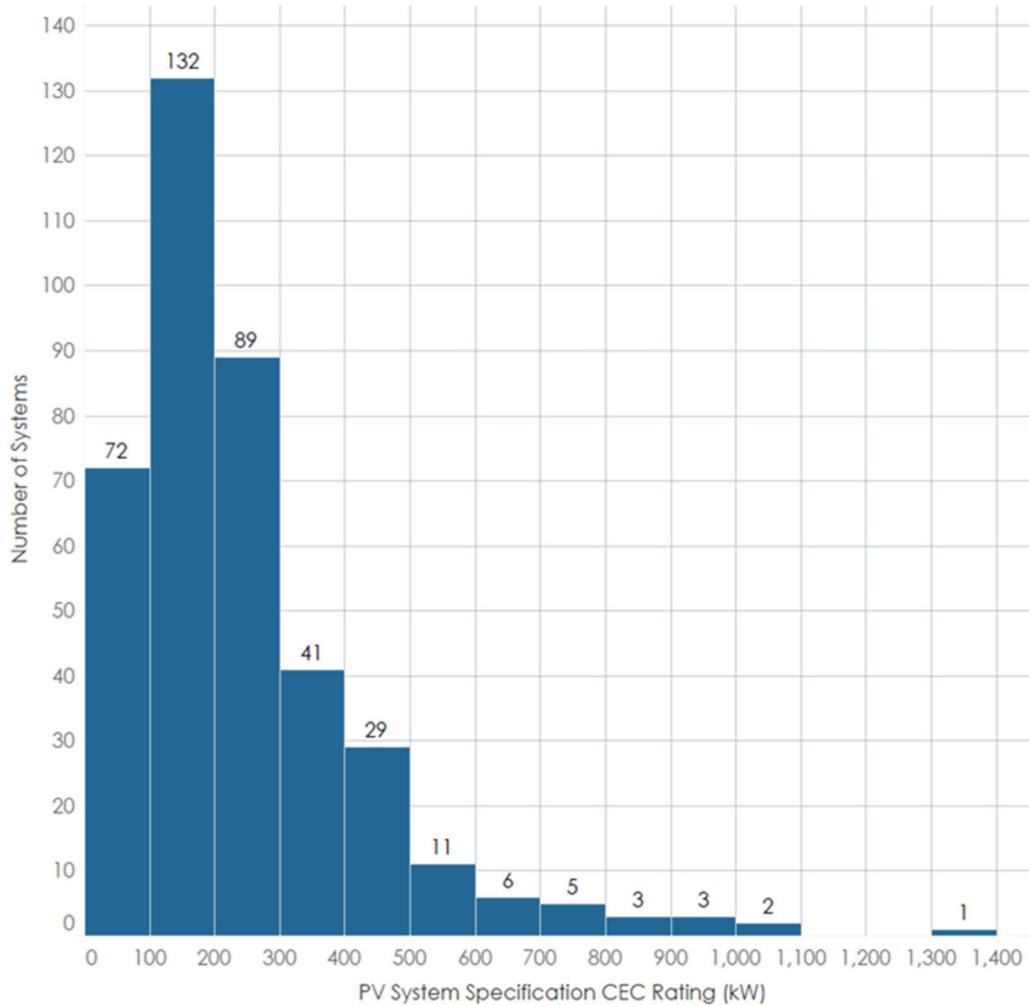
⁸ Data used to determine averages for the following three figures include waitlisted projects.



Average Size of Submitted Projects by Program (in kW)

| Program | Pending Reservation Approval | Application Status Reservation Approved | Waitlist |
|-------------------|------------------------------|---|----------|
| PG&E | 241.9 | 148.7 | 0.0 |
| SCE | 243.6 | 217.5 | 0.0 |
| SDG&E | 345.5 | 195.4 | 175.8 |
| Liberty Utilities | 111.7 | 0.0 | 0.0 |
| PacifiCorp | 148.6 | 0.0 | 0.0 |

Distribution of System Sizes





Percentage of MW Goal

Overall Percentage of 300 MW Goal

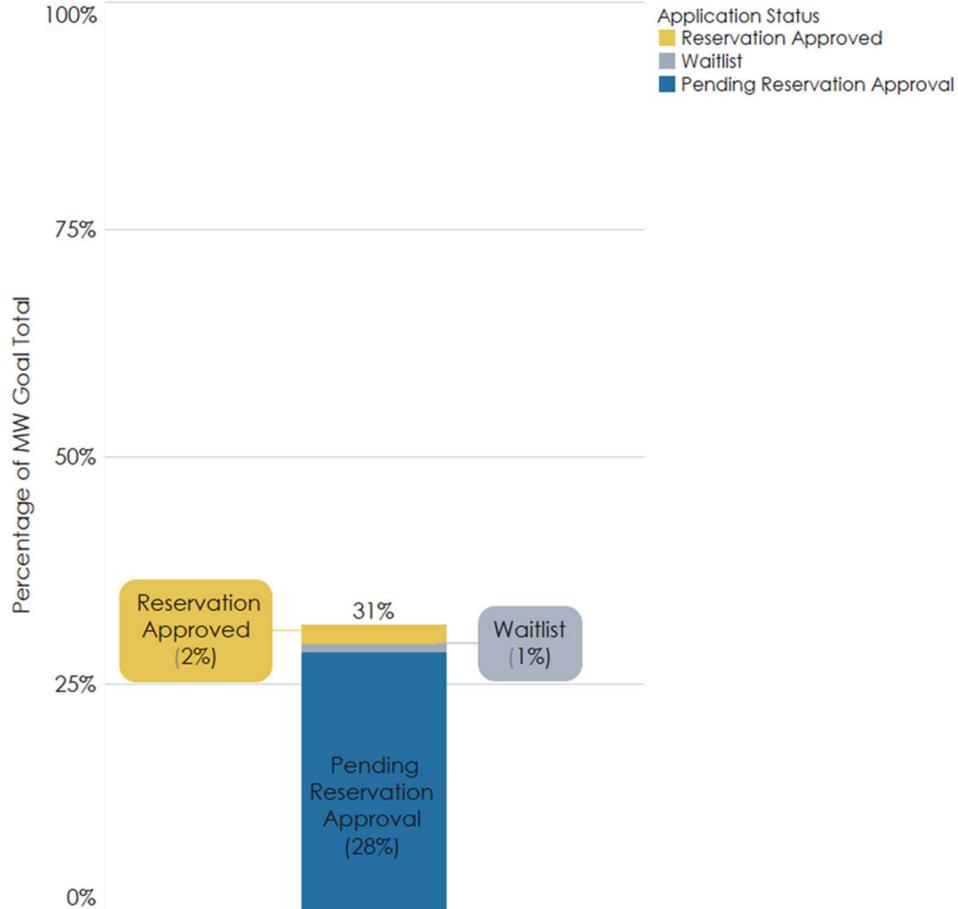
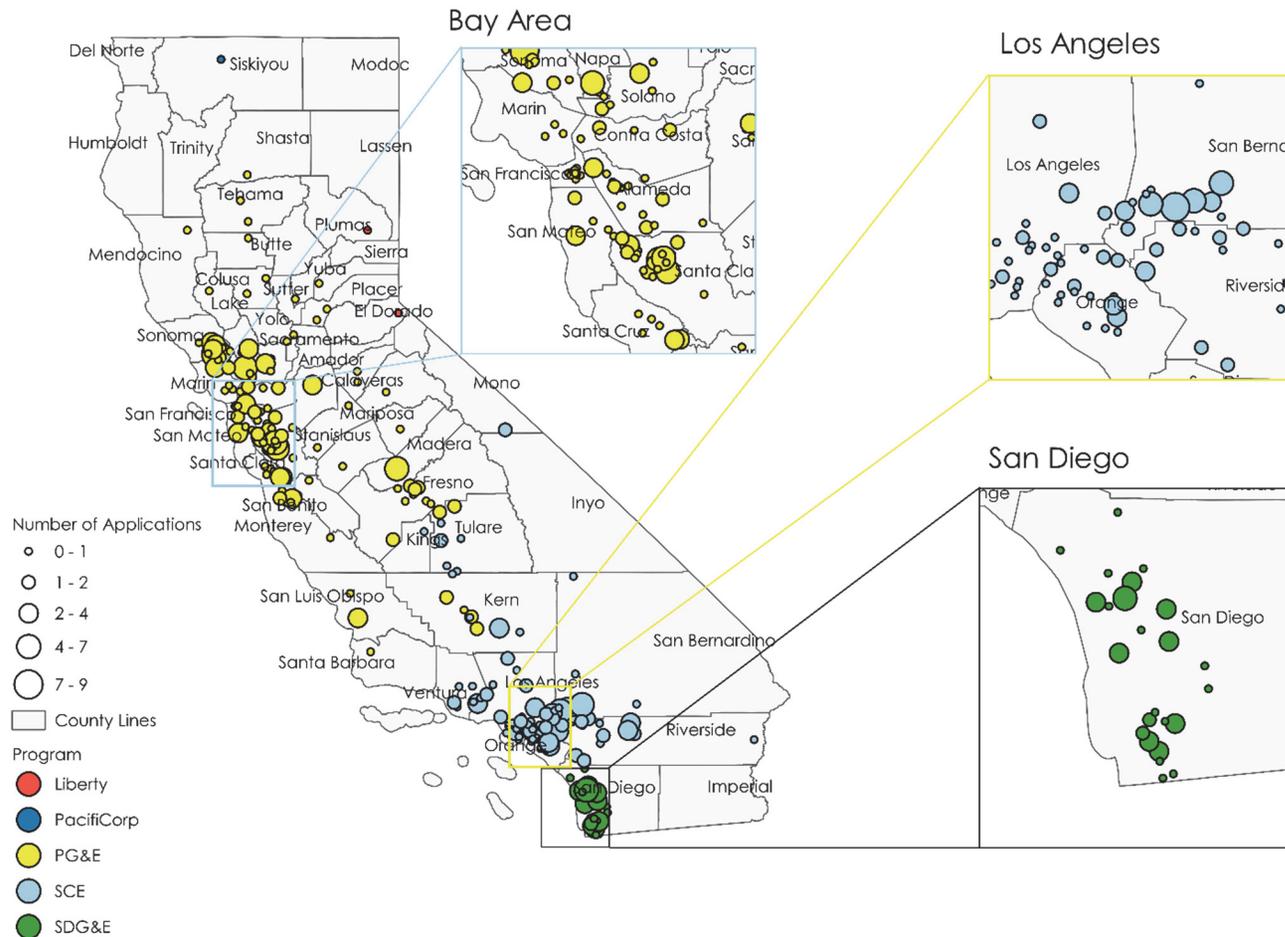


Figure 13 – Project Density and Location Visualizations

This map shows the geographic distribution of property locations for applications received thus far. For additional detail, a closer view is provided for areas of higher density in the San Francisco Bay Area, San Diego and the greater Los Angeles area.





3.1.2 Online Bidding Tool

The online bidding tool is a platform used to connect property owners with eligible SOMAH contractors, providing an apples-to-apples bid comparison. The platform is available for all SOMAH participants and supports the three-bid requirement for Track A projects. The online bidding tool maintains a repository of eligible SOMAH contractors that have completed the Contractor Eligibility Training webinar and registered their primary contact information with the SOMAH PA. SOMAH contractors can use the online platform to gain access to job leads, respond to project bid requests and demonstrate program compliance. To maintain a robust pool of eligible contractors for the program, contractor eligibility webinars are typically held every other month, with an additional webinar held in April 2020 due to increased contractor interest that the PA attributes to the COVID-19 public health crisis.

The online bidding tool serves three distinct functions. First, it allows the host customer to indicate their interest in receiving a bid from three contractors of their choice. This places the onus on the customer to do basic research on a contractor ahead of time, such as researching reviews or Better Business Bureau scores. After the customer's selection of bidders, the tool notifies the SOMAH-eligible contractors, who then get in touch to begin the process of building a site-specific proposal. Once all three contractors have completed proposals, the tool aggregates basic information about the proposal into a single user interface, which allows the host customer to compare topline proposal information including project cost, size, estimated date of completion and ownership type. The online bidding tool integrates with SOMAH's Project Bid Form. Whereas contractors have unique proposal generation tools and layouts with different underlying assumptions, SOMAH's requirement of a standardized bidding form harmonizes the detailed elements of a proposal into a consistent format containing objective and verifiable information.

In Q2 2020, the first host customer bid request was submitted and processed through the online bidding tool, with additional anticipated use later this year for other Track A submissions. This first project is leveraging the online bidding tool to meet the three-bid requirement for Track A. The SOMAH PA looks forward to reporting tool usage metrics and customer experience information in subsequent Semiannual Progress Reports when data is available in aggregate.

3.1.3 California Distributed Generation Statistics

Updated weekly on the California Distributed Generation Statistics [website](#), the SOMAH Working Data Set reports on all applications received for the program across the five utility territories. California Distributed Generation Statistics (previously named California



Solar Statistics) has been a valuable tool for customer-sited solar projects since its inception under the auspices of the California Solar Initiative. The report includes data associated with each waitlisted, pending, installed, withdrawn and/or canceled projects. Reported data includes, but is not limited to, application data, contractor information, incentive amounts and solar PV system cost and technical specifications. All personally identifiable information is scrubbed from the data set to ensure customer privacy. Based on direct feedback, the working data set has been a frequented resource for program stakeholders and participants to glean insights on program progress and trends. Program data from the working data set also populates data visualizations on the [SOMAH Statistics and Chart](#) page of California Distributed Generation Statistics. Seven charts and graphs are currently displayed on the page. The SOMAH PA is planning to release additional charts and graphs as projects complete installation and interconnection. Additional information on these charts and graphs will be provided in future reports as the program advances to completed projects. Section 4, Program Planning and Development, further elaborates on additional public reporting and transparency measures of the SOMAH program.

3.2 Marketing, Education and Outreach

The SOMAH program's 2020 marketing, education and outreach (ME&O) efforts are guided by an annual SOMAH Marketing Education & Outreach Plan. The [2020 SOMAH ME&O Plan](#), published in March, is organized by key audiences (contractors, property owners, job trainees, tenants and stakeholders) and six primary objectives that focus on maintaining a multiyear pipeline of geographically diverse projects, increasing contractor and property owner diversity, ensuring job trainee participation, educating tenants and co-marketing SOMAH in collaboration with other stakeholders.

Due to challenges that resulted from COVID-19, the SOMAH PA has limited marketing, education and outreach efforts to online strategies. These efforts included outreach to key SOMAH audiences and stakeholders via webinars, digital collateral, one-on-one portfolio review calls and co-marketing partnerships with programs that already reach SOMAH target audiences. The SOMAH PA also contracts with four community-based organizations (CBOs)⁹ with an on-the-ground presence in major multifamily affordable housing markets to support ME&O efforts through property owner and tenant education and outreach, specifically. CBO activities were directly impacted by COVID-

⁹ Asian Pacific Environmental Network (APEN), California Environmental Justice Alliance (CEJA), Communities for a Better Environment (CBE) and Environmental Health Coalition (EHC).



19 restrictions, with in-person outreach put on hold during shelter-in-place. CBOs continue to engage tenants and property owners online and are also exploring print and mail-based outreach activities.

The SOMAH PA has strived to ensure informational resources about the SOMAH program and its benefits are available to key program audiences and both current and potential program participants. These resources are housed in a comprehensive program website (CalSOMAH.org), with resources and content curated with user-specific experiences by audience and participant type. Key program resources include an easy-to-navigate, searchable HTML-based program handbook, a full application guide, program statistics and reports, tenant-facing materials and downloadable marketing toolkits for contractors, community choice aggregators/investor-owned utilities and government agencies.

The website has accumulated a total of 554 email subscribers, 109 of which are new subscribers during this reporting period. An average of 875 unique users per month, with 5,247 total new unique users for the reporting period, enabled the SOMAH PA to provide important email updates and event information to stakeholders. In the first half of 2020, the SOMAH PA developed additional online tools to further support program participants in their journey through the program. An interactive [Application Timeline](#) was created to ensure applicants are aware of and can easily access the required documents for each milestone. Additionally, a [frequently asked questions \(FAQ\)](#) webpage was created to provide quick answers to common inquiries with specific sections for applications, program eligibility, contractors, job training and tenants. Moving forward, the SOMAH PA plans to add additional resources, including an interactive PowerClerk Status Flow Chart webpage and a video series to help navigate the application process.

The SOMAH PA continues to focus on building a multiyear pipeline of projects to achieve the program's 300 MW goal. This year, ME&O efforts are focused on promoting Track A to achieve a more balanced Track A/Track B pipeline. The SOMAH PA recognizes that property owners require additional support when submitting an application compared to experienced contractors and is continuing to develop resources that make the application process easier to understand. The SOMAH PA is also implementing strategies to targeted geographic gaps in application coverage, which will help ensure an equitable distribution of projects across California. These strategies include targeted webinars for Central Valley housing associations and property owners, as the Central Valley has been identified as one region with a disproportionately low volume of applications. The SOMAH PA is also in the process of



finalizing a fifth CBO subcontractor based in the Central Valley to conduct targeted outreach in that region.

As projects move into the installation phases, efforts will continue to support program participants in meeting the job training and tenant education requirements. From an ME&O standpoint, this includes partnering with eligible job training organizations (JTOs) to educate students about SOMAH's job training opportunities and working with SOMAH's subcontracted CBOs to engage with property owners and develop educational and informational materials about the SOMAH program and its benefits. Due to the COVID-19 public health crisis, outreach and education efforts have moved to be fully online through online webinars and workshops, rather than in person. While solely online engagement can limit relationship-building and learning, the convenience of attending online events has resulted in a solid level of engagement and participation that continues to encourage the SOMAH PA. Regardless, the SOMAH PA is exploring print alternatives, as not all SOMAH audiences (especially trainees and tenants) have the same access to technology and the ability to engage in digital or remote outreach.

Previously, the SOMAH PA had prioritized the development of education and marketing support for individuals without active SOMAH applications and audiences who are unfamiliar with the program. Due to COVID-19, the SOMAH PA's priorities have shifted to providing participating property owners support and resources to better understand how their applications could be or have been impacted by shelter-in-place/quarantine orders and the effects of other COVID-19 responses such as rent and mortgage moratoriums. To account for COVID-19 impacts, the SOMAH PA has focused on compiling and providing relevant resources for program participants, including worksite safety materials, and implemented several temporary policies, including a 60-day extension for application deadlines. These policies, guidelines and resources have been shared via a webpage dedicated to [COVID-19 updates](#) on CalSOMAH.org.

Figure 14 – Number of Completed and Planned Surveys by Category

Surveys

| Survey Category | Number of Surveys Completed (through Q2 2020) | Number of Surveys Planned (through Q4 2020)* |
|------------------------|--|---|
| CBO Surveys | 0 | 1 |
| Contractor Surveys | 2 | 4 |
| IOU Surveys | 0 | 1 |
| Job Training Surveys | 0 | 2 |
| Property Owner Surveys | 0 | 3 |
| Tenant Surveys | 0 | 4 |

*Some survey timelines have yet to be finalized.



In order to measure and evaluate SOMAH's ME&O efforts and identify opportunities for improvement, the SOMAH PA is tasked with executing several surveys that target key program audiences. The data, both qualitative and quantitative, collected from these surveys will be used to identify areas of improvement for program resources and inform ME&O strategies/activities. For example, in the latter half of 2020, the SOMAH PA plans to administer a survey to property owners who are not yet in the program pipeline. This property owner survey is intended to inform potential property owners about the SOMAH program and assess which services and resources would best facilitate their participation in the program.

3.2.1 Contractors

In 2020, the contractor stakeholder group continued to have a high level of engagement with the SOMAH program due to the high volume of Track B applications, where contractors typically act as the applicant on behalf of the property owner. The SOMAH PA continues to market the program to potential participating contractors through hosting Contractor Eligibility Training webinars on a bimonthly basis. The Contractor Eligibility Training webinars introduce the SOMAH program at a high level, with a deeper dive into specific, relevant program requirements and the application submission process.

Figure 15 – Number of Eligible Contractors Over Time

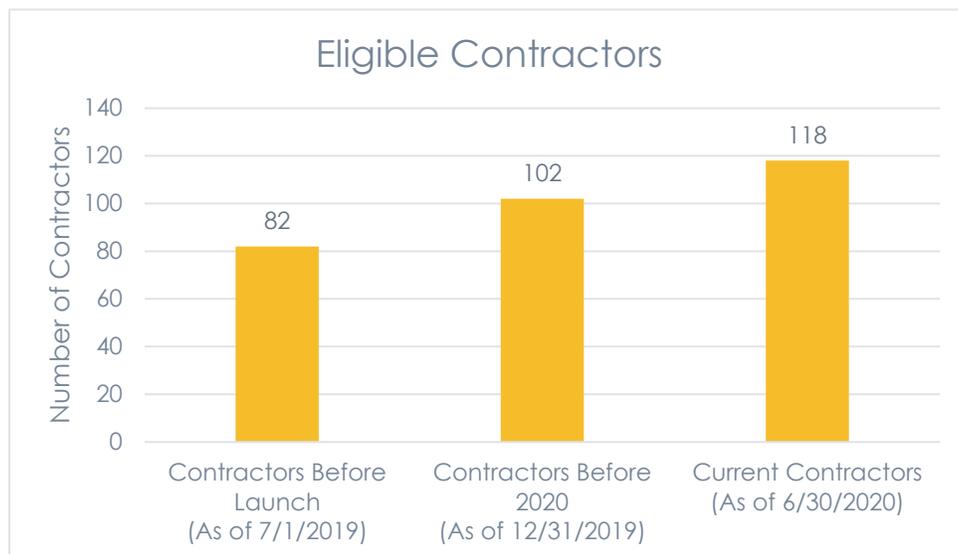




Figure 16 – Number of Questions Asked per Contractor Eligibility Training Webinar

Q&A*

| Month of Webinar | Number of Questions |
|------------------|---------------------|
| April 2019 | 156 |
| May 2019 | 44 |
| June 2019 | 20 |
| July 2019 | 14 |
| August 2019 | 5 |
| November 2019 | 1 |
| January 2020 | 5 |
| March 2020 | 16 |
| April 2020 | 9 |
| May 2020 | 1 |

*Questions asked during the workshops

While the SOMAH program continues to recruit a large number of licensed contractors through contractor outreach, the number of contractors with active applications has had incremental growth, with ten eligible contractors currently participating. Through conversations with applicants, the SOMAH PA understands that applicants plan to make extensive use of subcontractors to complete their installations, and so actual program participation is likely to extend well beyond these ten eligible contractors. As projects progress to the Proof of Project Milestone, the application process will capture subcontractor information for the PV installations that will be reflected in future reports.

Although the contractor stakeholder group continues to yield high levels of engagement through phone and email inquiries, webinar attendance and continued application submissions, there are evident barriers that may have hindered additional contractor participation. First, COVID-19 shelter-in-place restrictions throughout the state resulted in a significant slowdown in solar construction. The SOMAH PA administered a survey to eligible contractors with active applications to assess the impacts of COVID-19-related restrictions on their solar projects. While some contractors said they continued to operate, most respondents indicated that due to social distancing and shelter-in-place guidelines, application requirements such as the whole-building walkthrough audit in the Energy Efficiency Compliance Milestone were challenging to complete. In an effort to provide solar contractors, applicants and host customers with additional flexibility, the SOMAH PA issued a 60-day extension to all active applications and continues to offer assistance and application extensions on a case-by-case basis. As COVID-19 first emerged, the SOMAH program maintained engagement from solar contractors through virtual channels, despite a slowdown in overall construction activities. During this time, the SOMAH PA prioritized holding Contractor Eligibility Training webinars as well as webinars focusing on application updates in an effort to continue engaging with contractors. While the program did yield increased engagement with the contractor audience during the emergence of COVID-19, the engagement leveled off as the state of California deemed solar an



essential business and contractors were given the authorization to begin construction following COVID-19 safety precautions.

Second, despite renewed program funding in 2019/2020, the waitlists in the three largest investor-owned utility territories — established shortly after the July 1, 2019, program launch — may have deterred contractor participation in the SOMAH program. The SOMAH PA continues to promote the available incentive funding for the Liberty, PacifiCorp, PG&E and SCE territories on the program website, online webinars and digital collateral in an effort to encourage contractors to submit applications.

Prior to the halt of in-person marketing activities caused by COVID-19, the SOMAH PA attended two contractor-focused conferences to communicate the opportunity to participate in the program to a diverse contractor base. Attendance at both solar industry conferences yielded high levels of engagement with California solar contractors. SOMAH's presence at Intersolar North America gave solar contractors the opportunity to request clarification on the program requirements, incentive rates and how to enroll in the program.

- 1. Intersolar North America (Feb. 4-6, 2020, San Diego, CA) –** The SOMAH PA secured an exhibitor's booth in addition to a speaking engagement at Intersolar North America. The PA spoke about SOMAH's focus on equity during a panel discussion on state-level PV market development across the United States. Throughout the course of the conference, the SOMAH PA interacted with both eligible SOMAH contractors in addition to local California contractors that were previously unaware of the SOMAH program.
- 2. California Energy Commission EPIC Forum (Feb. 25, 2020, Long Beach, CA) –** The SOMAH PA secured an exhibitor's booth at the California Energy Commission's EPIC Forum. The conference was attended by a wide variety of stakeholders, including the contractor audience. Participation provided stakeholders with an opportunity to converse with the SOMAH PA to learn more about participating in the program.

Looking ahead, increasing the number of SOMAH-eligible contractors and subcontractors with active applications remains a priority. The SOMAH PA continues to prioritize and develop tactics that target barriers to participation in the program to increase the number of contractors with active applications. In the latter half of 2020, the SOMAH PA intends to administer a survey to eligible SOMAH contractors to identify potential barriers to participation in the program and develop solutions to increase contractor diversity. Central to the SOMAH PA's 2020 strategy to build a diverse



contractor base is educating all parties about available tools, ensuring contractor diversity across all SOMAH platforms and providing access to resources that help contractors navigate barriers, such as a Contractor Engagement Committee.

3.2.2 Property Owners

Direct outreach to new property owners was challenging during most of the first half of 2020 due to shelter-in-place restrictions and social distancing guidelines related to the COVID-19 outbreak. To better understand how property owners were being impacted during this time, the SOMAH PA conducted short phone surveys with several participating property owners. Overall, they noted the challenge of having to prioritize tenant safety and be responsive to tenant protection measures and new housing policies, while trying to navigate the requirements of a complex program like SOMAH. In response to these challenges, and the fact that outreach through conferences and in-person events was put on hold, the SOMAH PA began to increase its virtual presence by increasing webinars and creating online materials for property owners to learn more about the program.

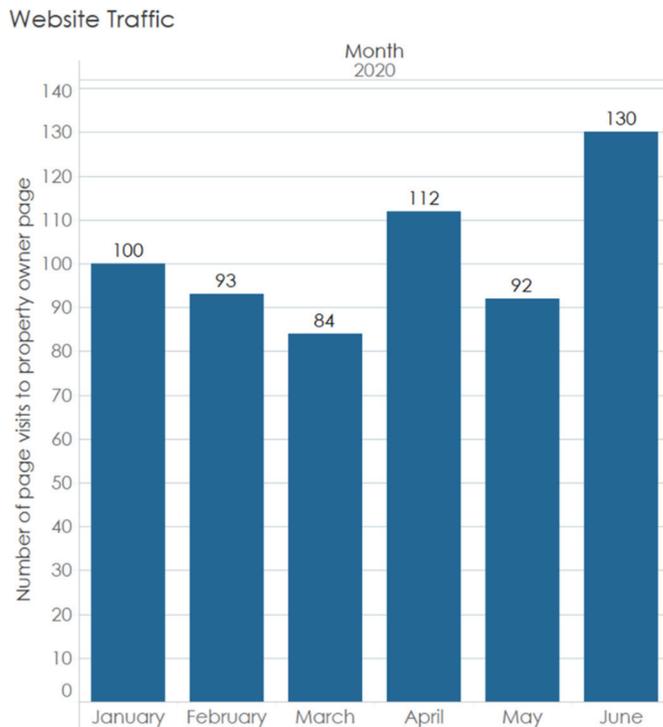
The SOMAH PA recognizes that adding solar to an affordable housing property is a complex and intimidating process for property owners and may not seem feasible. To assist property owners in learning about SOMAH's benefits and navigating the SOMAH application process, the SOMAH PA has and will continue to produce educational resources such as informational flyers, targeted website pages, a Property Owner Webinar series and other direct outreach. The following webinars were held during the reporting period and targeted to the property owner audience:

- Clean Energy Resources for COVID-19 response
- Energy Efficiency
- Understanding Project Bids
- Upfront Technical Assistance
- GREEN Talk: SOMAH program overview (Central Valley)

The SOMAH PA has continued its property owner webinar series to increase engagement with property owners currently on the waitlist. However, due to the complexity surrounding the SOMAH application process and property owner feedback, the PA is continuing to explore how to optimize current and develop new materials that support existing and prospective property owners in navigating the program. The SOMAH PA understands that property owners require multiple touch points and different levels of engagement before applying. During this time, the SOMAH PA has focused largely on ensuring this engagement reaches property owners virtually.



Figure 17 – Property Owner Website Traffic



As projects continue to progress through the application milestones, the SOMAH PA has seen an increase in property owner engagement and more questions surrounding different project milestones. Given that some of these property owners are still on the waitlist (SDG&E territory), the SOMAH PA focused on keeping these waitlisted property owners engaged with SOMAH and provided them with relevant information such as energy efficiency topics and how to submit a request for technical assistance. Property owners currently in the pipeline have expressed interest in learning more about programs they can pair with SOMAH to further reduce energy costs, so the PA continues to

work on co-marketing opportunities with those programs, as well as giving property owners resources to connect them to the programs. Figure 18 shows property owner attendance across the four property owner webinars hosted by the SOMAH PA. In the coming program years, the SOMAH PA will continue to prioritize the production of educational content that focuses on the more technical aspects of the program as a resource for property owners to better understand SOMAH program requirements. The SOMAH PA also intends to work with other statewide and utility programs to understand how property owners can stack incentives and further decrease their energy costs.

Outreach during this reporting period was greatly impacted by the onset of COVID-19, therefore the SOMAH PA shifted our focus to providing resources and supporting property owners that are currently in the application pipeline. Additional resources for the property owner-specific webpage were developed, including short YouTube videos for property owners to better understand Track A and the entire upfront technical assistance process. The SOMAH PA plans to increase the resources on the property owner page to include more information on topics such as energy efficiency, solar readiness and energy storage.



3.2.3 Tenants

Tenant benefits continue to be a central pillar of the SOMAH program, with a primary objective of ensuring that tenants living in both potentially eligible and participating SOMAH properties are aware of and able to benefit from SOMAH in an equitable manner.

To engage tenants effectively, the SOMAH PA has renewed its contracts with its four subcontracted CBOs for the subsequent year. These four CBOs focus on environmental justice, tenant rights and solar workforce development: Asian Pacific Environmental Network (APEN), California Environmental Justice Alliance (CEJA), Communities for a Better Environment (CBE) and Environmental Health Coalition (EHC). These CBOs continue to add capacity and support targeted outreach efforts to disadvantaged and underserved audiences. Starting in Q3 2020, the SOMAH PA will be subcontracting with an additional CBO partner in the Central Valley. This is to address geographic gaps within the program and ensure all communities that can benefit from the SOMAH program are informed and provided with engagement through a local CBO. This fifth CBO partner is being selected through an extensive request for proposal process that looks at geographic prominence within the region; marketing, education and outreach approach; and scope feasibility.

The SOMAH PA worked with IOU representatives and CBOs to complete a suite of tenant engagement materials providing information about SOMAH's benefits, while also providing more holistic and contextual information about accessing clean energy programs in California. To address language barriers and ensure information access, these materials have been translated into six languages: Spanish, Chinese, Arabic, Vietnamese, Korean and Tagalog. The SOMAH PA concurrently developed and released presentation materials for property owners to meet SOMAH's tenant education requirements, including versions specific to each IOU. The SOMAH PA also continued service with the Tenant Hotline, which offers tenants assistance in English and Spanish and is expected to be more active in the second half of 2020 as more projects are underway.

In response to the COVID-19 public health crisis, the SOMAH PA determined that there was no need to update or change the tenant education requirements because the existing requirements do not require in-person outreach efforts and can be completed through mail or email and are not impacted by COVID-19's physical distancing protocols. The PA included specific recommendations and guidance for tenant education in a COVID-19 environment via the [CalSOMAH website](#) and through public



forums. The PA also created resources to promote the safety of all participants and increase awareness of COVID-19 safety protocols on site.

Additionally, the SOMAH PA will focus on evaluating the effectiveness of tenant engagement strategies — including tenant educational materials and property owners' implementation of tenant engagement requirements — with a suite of surveys, targeted focus groups and interviews. These measures to attain feedback have been delayed due to COVID-19 and are currently being redesigned to account for health and safety measures for all participants. The PA aims to conduct an initial pilot analysis slated for early Q4 2020 with data analysis/processing in Q1 2021, aligning with expected project construction timelines and the completion of interconnection and ensuring that all tenants have begun to receive electric bills including SOMAH bill credits from their utility provider. The data resulting from tenant surveys will be both qualitative and quantitative and will inform how to adjust program tactics around tenant engagement and benefits. Through surveys, the SOMAH PA intends to understand:

- Whether current tenant education requirements for property owners are adequately preparing tenants for SOMAH solar projects and informing them about the benefits they can receive (i.e., bill credits, job training opportunities, energy efficiency services, etc.)
- Whether the required tenant education materials are useful to tenants
- How to improve upon methods for conducting tenant education and evaluating what information is most relevant/not as relevant

The number of tenants surveyed will be based on the total population of tenants in each IOU region who live in SOMAH-participating properties, with the desired confidence level of 80% and a 5% margin of error.

3.2.4 Additional Stakeholders

There are additional stakeholders that have vested interests in SOMAH. The SOMAH PA identifies these additional stakeholders as audiences whose interests in the program lie outside of directly participating, but who have interests in SOMAH and its impact on their communities and/or constituents. These entities include IOUs and community choice aggregators (CCAs); state, regional and local government agencies; industry associations; the CPUC; the CA Energy Commission, and other non-SOMAH contracted CBOs.

The SOMAH PA has focused on equipping these stakeholders with high-level program information and basic resources to share with their constituents and to help co-market



and promote SOMAH along with their relevant programs and priorities. Due to COVID-19-related restrictions on in-person activities, the PA shifted to online outreach efforts during this reporting period. The SOMAH PA initiated over 50 email communications with CCAs and local government agencies to raise awareness of the SOMAH program and discuss possible co-marketing strategies. The SOMAH PA created a CCA and IOU Marketing Toolkit and a Government Marketing Toolkit. These toolkits contain suggested website, e-newsletter and social media content that can be deployed by these stakeholders and are available for download on the website.

In the first half of 2020, stakeholder engagement had a focus on reaching CCAs and government agencies, typically departments responsible for climate action plans, that might not be familiar with SOMAH. Specifically, the SOMAH PA prioritized reaching out to government agencies in disadvantaged communities. Through our outreach efforts, the SOMAH PA has participated in online meetings and given presentations for CCAs and government agencies to discuss the SOMAH program and explore co-marketing opportunities. The PA also attended two CCA-focused conferences to network and learn about how to best engage with this audience. Additionally, the SOMAH PA continued efforts to engage with stakeholders already familiar with SOMAH by sharing information through the SOMAH email list and monthly IOU Working Group meetings to report progress and leverage IOU resources and networks.

Stakeholder engagement in the first half of 2020 helped strengthen existing relationships as well as introduce the program to new stakeholders, which will enrich the PA's engagement efforts in 2021. In 2021, the primary focus will be engaging with new stakeholders that are less familiar with SOMAH by sharing success and impact stories to build support, awareness and participation in the program. Efforts will also be made to maintain communications with stakeholders who are already familiar with the program, encouraging them to remain active and engaged.

The SOMAH PA is also working with IOUs to identify opportunities to collaborate with their networks of CBO outreach partners. The SOMAH PA collated a list of nearly 200 CBO organizations currently collaborating with IOUs across the state on outreach and have been working with each IOU to identify CBOs that could help co-market and share relevant information about the SOMAH program and its benefits to their constituents.

The SOMAH PA is continuing to engage with the CPUC's Low-Income Oversight Board and had a call with a couple of board members in Q1 2020. In addition to sharing key program documents (SOMAH Semiannual Progress Report and annual SOMAH Marketing Education and Outreach Plan) and providing semiannual updates, the PA is



continuing to plan and strategize for how best to engage with this body — keeping them informed and seeking input and guidance on relevant program developments.

3.3 Workforce Development

A primary goal of SOMAH is to promote economic development in low-income and disadvantaged communities through job training opportunities and local and targeted hiring. In response to the COVID-19 public health crisis, the SOMAH PA has thus far determined there is not a need to update or change the job training requirements. This determination was made by considering the following: solar construction was deemed an essential service by the state since the early onset of COVID-19, there are robust safety precautions contractors can take to ensure job trainee safety both on-site and working remotely, trainees may qualify from both directly working on the installation on-site and from remote work (e.g., design, engineering, project coordination) and the extensive timeline for the typical SOMAH project creates multiple opportunities for contractors to utilize trainees over the period of many months to over a year. The SOMAH PA recommended specific guidance for contractors and job trainees via the [CalSOMAH website](#) and through public forums.

The health and safety of job trainees, tenants, contractors and all program participants is the main priority of the SOMAH PA. The SOMAH PA will continue to provide updated health and safety resources to all program participants through the CalSOMAH website, the Job Training Portal, webinars and public forums. The SOMAH PA will also actively seek input from contractors and job trainees, monitor the COVID-19 situation and remain nimble to adjust the job training requirements, if needed in the future.

Building on outreach efforts since program launch, SOMAH continues to engage job training organizations (JTOs) in promoting SOMAH to their students and trainees, helping SOMAH contractors meet the program's job trainee hiring requirements and ensuring trainees have the information and resources they need to successfully participate in SOMAH-related installation projects. To support these aims, the SOMAH PA launched its Job Training Portal with the full program website in June 2019, and the PA continues to update, improve and add relevant resources to the Job Training Portal to support job trainees and contractors.

To date, the SOMAH PA has confirmed the eligibility of approximately 80 JTOs across California and is actively contacting and vetting over 300 organizations. Additionally, through broad-based and targeted outreach efforts, including participating in five solar job fairs, five webinars and outreach communications and site visits with JTOs, SOMAH has over 200 trainees in the resume bank ready to participate in installations or other



project-related work. In 2020, the SOMAH PA has targeted outreach to JTOs and job trainees in regions where there is a high volume of SOMAH projects and disadvantaged communities. Of the 200+ trainees registered on the Job Training Portal, 48% reside in disadvantaged communities.

To support SOMAH's workforce development efforts, the SOMAH PA subcontracted with Rising Sun Center for Opportunity to help engage JTOs and produce resources for JTOs and contractors that include a "best practices" guide for hiring disadvantaged workers designed for solar contractors and hiring firms.

Despite setbacks experienced by JTOs due to COVID-19 (i.e., inability to continue in-person classes and training), SOMAH has continued to engage JTOs through meetings, virtual presentations and webinars. In a survey issued by the SOMAH PA to JTOs in April 2020 addressing impacts caused by COVID-19 and shelter-in-place orders, all respondents confirmed that they were still in contact with their students and recent graduates, and many programs are offering online training and education. Over 90% of respondents reported that their participants were experiencing difficulties finding employment due to COVID-19-related barriers. The SOMAH PA, with the support of JTOs and CBOs, will continue to build trainee participation in the SOMAH Job Training Portal and ensure that the trainee pipeline includes tenants of SOMAH properties. Property owners will be provided tenant educational materials to distribute on-site that will promote the job training opportunities available for residents.

Lastly, the SOMAH PA will work with contractors to better understand trainee hiring barriers and challenges and gather feedback on job training experiences through surveys to assess how many permanent versus temporary jobs are being created. The SOMAH PA is also developing surveys for job trainees and JTOs to evaluate their experience with SOMAH job training opportunities.



3.3.1 Local Hiring and Job Training

Figure 18 – Job Trainees Located in DACs

To date, more than 200 trainees have signed up on the portal. Due to the limited number of projects that have begun construction and reached program milestones where job training data is entered, the SOMAH PA has only been able to provide projections as placeholder data for key metrics such as total number of trainee hours and number of jobs generated. This data is based on current SOMAH project application data (including reservation and waitlisted projects). Data on local and targeted hires and trainee job advancement (i.e., the number of SOMAH trainees who become full-time solar employees) will be collected through surveys and the Job Training Affidavit once projects begin to reach the Incentive Claim Milestone.

Percentage of Job Trainees in Disadvantaged Communities (DACs)

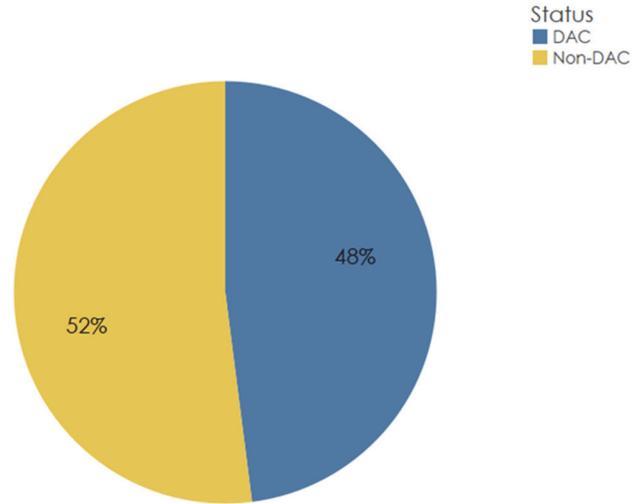


Figure 19 – Projected Job Trainee Count and Metrics

Job Trainee Metrics

| | Active Applications | Waitlist Applications | Total |
|--------------------------------------|---------------------|-----------------------|--------|
| Number of job hours | 54,320 | 1,800 | 56,120 |
| Number of job weeks | 1,358 | 45 | 1,403 |
| Number of job years | 26 | 1 | 27 |
| Number of SOMAH project applications | 380 | 15 | 395 |
| Number of trainees | 732 | 27 | 759 |



3.4 Technical Assistance

The SOMAH program offers two technical assistance (TA) offerings: upfront TA and standard TA. Upfront TA services are designed for property owners participating in Track A and who request preliminary TA services primarily to assess solar feasibility. Upfront TA services can assist the property owner in understanding the solar potential for their site and the associated costs and benefits of moving forward with a SOMAH project. Standard TA services are designed for projects in both Track A and Track B and may be conducted at multiple stages within the project life cycle and can be requested by both property owners and contractors. Standard TA services relating to energy efficiency, general project management, construction support and project financing may be requested via email to the SOMAH PA or at [CalSOMAH.org](https://www.CalSOMAH.org) at any point after the reservation request package has been submitted.

While the number of Track A application submissions in year one is lower than anticipated, the SOMAH PA is committed to increasing Track A participation in future years of the program. Additional information on strategies and implementation measures are included in the 2020 ME&O plan. The SOMAH PA has continued efforts in internal process development activities from 2019, including finalizing process and database development, software configuration and template creation for host customer technical assistance reports and coordination with related programs for leveraging energy efficiency, electric vehicles (EVs) and EV charging, as well as energy storage resources and incentives. The SOMAH PA continues to hold recurring internal coordination meetings for TA and developed a detailed process flow for TA handoff to ensure seamless experiences for both upfront and standard TA requests. The PA continues to support standard TA requests for projects on an as needed basis. Standard TA offerings during this reporting period included financial technical assistance and energy efficiency program referrals.

At the start of 2020, the four Track A projects from the previous reporting period were still under review. Three of those projects were canceled due to duplicate submissions and eligibility qualifications, but the fourth project advanced to Upfront Technical Assistance Approved by the end of Q1. The SOMAH PA energy project manager (EPM) supporting the TA for that project provided preliminary solar feasibility reports and helped the property owners facilitate their use of the online bidding tool to solicit three bids from SOMAH-eligible contractors. At the close of this reporting period, the bid solicitation and selection process was still underway. One more Track A project joined the Track A group in January 2020 but was ultimately deemed ineligible for the program due to funding sources not compliant with the program.



4. Program Planning and Development

In order to preserve long-term program growth, the SOMAH PA takes an adaptive approach to ensure that feedback is regularly solicited and communicated to program participants and stakeholders. The SOMAH PA aims to implement the program and make program development decisions transparently and in close partnership with the program's advisory bodies and CBO partners, while remaining accountable to the communities SOMAH was intended to benefit. The following section provides information on the SOMAH PA's maintenance of official records as well as efforts to collect feedback regarding program implementation and development from key stakeholders and community beneficiaries.

Official Record Maintenance

- SOMAH Incentive Budget Report and Working Data Set (updated weekly)
- Semiannual Progress Reports
- Semiannual expense reports
- Annual marketing, education and outreach (ME&O) plans

Place of record: californiadgstats.ca.gov/programs

- Special reports to the California Legislature
- Third-party evaluation reports

Place of record: <https://www.cpuc.ca.gov/General.aspx?id=6442454736>

During this reporting period, the SOMAH PA highlights two areas of growth and focus: 1) update on activities related to reporting, feedback and accountability; and 2) program design updates including updates to the program handbook, exploration of a potential progress payment feature and SOMAH's annual incentive step-down calculation.

4.1 Reporting, Feedback and Accountability Mechanisms

4.1.1 Public Forums

SOMAH public forums are quarterly events that allow the SOMAH PA to share program updates, such as statistics regarding program implementation, to propose modifications to program implementation to better attain program objectives and to hear from stakeholders about their user/participation experience and potential improvements.

SOMAH has had two public forums for the current reporting period, both of which were fully remote, to comply with COVID-19 and social distancing health and safety



guidelines. Agendas for both public forums included items to share and discuss the impacts of COVID-19 on the program and its participants, including short-term/temporary program changes and updates. Listening sessions helped the SOMAH PA to better understand how participants and the industry as a whole were and are continuing to be impacted by COVID-19. This is an item the PA will continue to track and report on in future public forum agendas.

Both Q1 and Q2 2020 public forum agendas focused on proposed program changes via the SOMAH Program Handbook, including proposed changes to the program handbook including: updating the application pipeline management with a lottery system for waitlisted applications and required notification for early job trainee termination. The Q2 2020 public forum also included a presentation for the methodology on calculating the annual incentive step-down and new rates.

The SOMAH PA publishes the presentation slide decks and meeting notes including stakeholder questions and SOMAH PA answers via the [CalSOMAH.org website](https://CalSOMAH.org) following each public forum event.

Q1 2020 public forum place of record:

- [SOMAH Public Forum Q1 2020 Presentation](#)
- [SOMAH Public Forum Q1 2020 Notes](#)

Q2 2020 public forum place of record:

- [SOMAH Public Forum Q2 2020 Presentation](#)
- [SOMAH Public Forum Q2 2020 Notes](#)

4.1.2 SOMAH Advisory Council

The purpose of the SOMAH Advisory Council (SOMAH AC) is to ensure that the voices and interests of equity-focused community advocates and key stakeholders remain at the center of the SOMAH program for its duration and that SOMAH maximizes benefits to low-income tenants and DACs by advising the SOMAH PA on program development and implementation.

The framework for the SOMAH AC is generally modeled on the existing Senate Bill (SB) 350 Disadvantaged Communities Advisory Group (DAC-AG), though there are inherent differences around reporting requirements and council appointments. The nine advisory council members were unanimously selected through an application process that included an independent selection committee and represent focal areas in



environmental justice, workforce development/labor, tenant rights, affordable housing and the solar industry.

The SOMAH AC meets quarterly to monitor and discuss (via a range of agenda topics) the progress of the program and to provide guidance and advice to ensure that the program maximizes benefits to the communities it intends to serve. In addition to the Q1 and Q2 quarterly meetings, the SOMAH AC held an hour-long ad hoc meeting to provide feedback on the PA's proposals for addressing COVID-19 impacts within the SOMAH program, including a potential proposal to implement a progress payment option for contractors.

SOMAH's Q1 2020 Advisory Council meeting included:

- A comprehensive program update, including a review of key performance indicators and program area updates spanning marketing, education and outreach; workforce development; technical assistance; and program implementation.
- A review and discussion of proposed and prospective SOMAH Program Handbook updates, including a new approach to application pipeline management via a conditional lottery.

SOMAH's Q2 2020 Advisory Council meeting included:

- Member business, including member advocacy around SOMAH's scheduled incentive step-down.
- A SOMAH Job Training Organization Task Force report out.
- COVID-19-related program implementation and development updates, including extensions, work on progress payments and measures to ensure trainee and tenant safety.
- An update on and strategies for engaging property owners in the Track A opportunity.

SOMAH's Ad Hoc Advisory Council meeting included:

- An update on COVID-19-related impacts on participants.
- An update on the SOMAH PA's work on progress payments.

The place of record for the SOMAH Advisory Council (including meeting notes) is CalSOMAH.org/advisory-council.



4.1.3 IOU Working Group

The SOMAH PA hosts a monthly IOU Working Group meeting with attendance from program manager representatives from each of the five SOMAH-eligible IOUs and the CPUC ED. This regular working group is a time for the SOMAH PA to provide program updates for the IOUs and solicit feedback on various aspects of the program. Discussion topics from past IOU Working Group meetings included:

- Kicking off the exchange of Energy Saving Assistance (ESA) Program referral information and Approved Projects lists
- MASH and SOMAH stacking considerations and data exchange
- Alternate VNEM tariff
- COVID-19 response
- Potential progress payments proposal

The SOMAH PA works closely with the IOUs to ensure successful implementation of the program and this working group is an example of the committed partnership among many stakeholders.

4.1.4 SOMAH Regional Job Training Organization Task Force

In order to engage JTOs and ensure that their voices and interests remain at the forefront of the SOMAH program's job training efforts, the SOMAH PA launched the Regional Job Training Organization Task Force (JTO Task Force) in Q1 2020. The JTO Task Force will shape strategies for engaging job trainees and the creation of resources to ensure that trainees obtain maximum benefit from training opportunities on SOMAH installation projects, including subsequent, full-time job offers in the solar industry and, over time, career advancement and wage growth.

This task force is composed of nine regionally diverse representatives from JTOs, such as California Community Colleges, career technical education programs, PV training programs offered to the public by local government workforce development programs, community nonprofits, private enterprises, IOUs or electrical worker unions with 40+ hours of instructional and/or hands-on PV installation and design training or green building training.

Because SOMAH is a statewide program that will have solar installation projects and job training opportunities across California, task force members include representatives from the following regions: San Francisco Bay Area, Central Coast, Central Valley, Inland Empire, Los Angeles and San Diego. Task force members also represent both rural and urban areas of the state. The JTO Task Force supplements the SOMAH AC in providing advice to the SOMAH PA specifically on the job training requirements of the



program and will help realize requirements of AB 693 to drive economic benefits to DACs through local and targeted hiring by highlighting the voices and needs of job trainees from DACs and low-income communities.

Similar to the SOMAH AC, the JTO Task Force meets quarterly. At its launch meeting in Q1 2020 the SOMAH PA provided a program overview and update to the task force and led sessions dedicated to developing bylaws and a long-term vision and agenda-setting for the task force. The task force also held an ad hoc meeting to finalize the bylaws, elect a chair and vice-chair and continue to determine task force priorities and structure. The Q2 2020 meeting continued to build on the priorities and planning from the previous meetings, reviewing a vision statement and priorities and developing proposals related to priority workforce development program areas.

The SOMAH PA is in the process of developing a JTO Task Force webpage that will have a similar layout and similar content to the SOMAH AC webpage on CalSOMAH.org. This webpage is expected to go live with the next round of web updates in Q3 of this year.

Place of Record: CalSOMAH.org/job-training-organizations

4.1.5 Third-Party Evaluation

Public Utilities Code (PUC) Section 913.8 requires the CPUC to provide the Legislature with a report on SOMAH program participation and progress toward legislative goals by July 30, 2020, Phase 1 of the third-party evaluation. The SOMAH PA participated in Phase 1 of the third-party evaluation in the first half of 2020, with the Phase 1 Draft Report filed on March 26, 2020. The PA coordinated with third-party evaluators through interviews and data sharing to provide an overview of all aspects of the program administration, including the planning and development and reporting processes. The interview and data sharing were essential steps in sharing key program information with the third-party evaluator to support the report's SOMAH program theory and logic model and to provide context on program requirements and outcomes for the report recommendations.

As outlined in the Phase 1 Draft Report, timing of the Phase II of this evaluation will be driven by program activity and the status of projects advancing to installation and completion for full data collection and program participation. The current SOMAH schedule has the Draft Phase II report released in mid-February 2021 and the Final Phase II report to be completed by the end of March 2021. In reflection of other feedback and accountability mechanisms, the SOMAH PA looks forward to continued partnership with the third-party evaluators to implement program recommendations and explore the insights and responses gleaned from this evaluation process.



4.1.6 USDA Projects

Similar to the July 2019 HUD memo reported on in the prior Semiannual Progress Report, the SOMAH PA received a letter from the U.S. Department of Agriculture (USDA) on June 29, 2020, outlining the exclusion of tenant solar credits from annual utility allowance calculations for SOMAH projects at USDA Rural Development (RD) Financed Properties. The letter attests that based on the program requirements and guidance from the HUD memo, property owners of USDA RD financed properties are permitted to exclude tenant solar credits from utility allowance calculations. The letter further notes that USDA RD approval is subject to Housing and Urban Development (HUD) guidance of utility allowance at federally financed affordable housing projects and strict adherence to USDA RD regulations in all other respects. This overarching letter from USDA allows the PA to remove the application requirement for individual project letters from USDA at the Reservation Request Milestone, opting to note the compliance period on the cover sheet while attesting to compliance for the income requirement of 80% of the property residents having incomes at or below 60% of the area median income (AMI). The SOMAH PA will also utilize the publicly available USDA RD database to verify the project information, further ensuring compliance with the program requirements and streamlining the application review process for USDA projects.

4.2 Program Design and Updates

4.2.1 Program Handbook

This subsection reviews the SOMAH PA's work to update the SOMAH Program Handbook conducted during this reporting period.

Second Edition - Finalized

The SOMAH PA worked to iterate the SOMAH Program Handbook in this reporting period and completed its second edition following Resolution E-5054 issued on June 5, 2020, approving proposed revisions to limit participation of a photovoltaic (PV) project to either the SOMAH program or the MASH program.

Third Edition - Proposed

Following a robust stakeholder engagement process including with SOMAH's CBO partners, the SOMAH Advisory Council, SOMAH public forums and SOMAH IOU Working Group meetings, the SOMAH PA also completed work on a more comprehensive edit and submitted Advice No. 114-E on June 26, 2020.



Proposed edits are categorized into substantive, minor and typographical/non-substantive revisions, reviewed in brief below. Pending the disposition of the advice letter, the PA will report on any substantive outcomes in future periods.

Proposed substantive revisions include a revision of SOMAH's first-come, first-served approach to application processing and waitlisting, required notifications for early trainee termination and requirements for system changes affecting incentive amounts.

Proposed minor revisions include the further specification of the applicable incentive rate, clarification regarding the prohibition of reservation transfers, required job posting timeline for SOMAH training opportunities, clarification of wage requirements for projects with subcontractors, changes to the energy efficiency compliance milestone lookback period, allowance of electronic incentive payments, specifications for grounds for incentive payment clawback, requirements for an affidavit ensuring SOMAH income level compliance, updated Cover Sheet for Multifamily Low-Income Housing Documentation and further specification of types of ineligible multifamily properties.

Other edits included typographical/non-substantive revisions to correct errors, modify word choices to further clarify program rules, rearrange bodies of text to improve the flow of the presented information and define additional terms that are used in the SOMAH program and Handbook to provide common definitions.

4.2.2 Potential Proposal for SOMAH Progress Payments

This subsection summarizes the SOMAH PA's work on a potential proposal to provide an additional pathway for the payment of portions of the total incentive payment to be provided to the applicant or their designated recipient at the completion of earlier milestones in the project process before an Incentive Claim Package submittal.

Currently, the SOMAH program pays incentives after a solar energy system has been fully installed, inspected and received permission to operate (PTO) from the local electric utility, and the Incentive Claim Package has been submitted by the applicant and approved by the SOMAH PA. Beginning in March, program applicants reported difficulties they were encountering as a result of COVID-19-related restrictions and the potential impacts on SOMAH projects. Specifically, applicants expressed concerns related to the financial impacts of extended project timelines due to delays in construction, permitting and interconnection. In response, the SOMAH PA has begun to explore a potential pathway through which applicants may receive portions of the incentive at earlier milestones to alleviate challenges in accessing capital and improve applicant cash flow timelines. To date, the SOMAH PA has solicited feedback from



participating solar contractors, CBOs, IOUs, solar financing and bonding companies and Energy Division staff, and continues to evaluate potential pathways.

Through the course of these discussions, a potential co-benefit of instituting progress payments has emerged in the form of reduced barriers to participation for smaller contractors, an increased ability for smaller properties to participate and an increase in the number and share of cash-purchase systems by host customers, which may deliver higher lifetime credits on energy bills to tenants and host customers.

The SOMAH PA will continue to explore the potential to institute progress payments and will report on developments in future Semiannual Progress Reports.

4.2.3 Incentive Step-Down Analysis

This subsection summarizes the SOMAH PA's work, required by Decision 17-12-022, to reduce SOMAH's incentive levels annually. Decision 17-12-022 (Section 4, pages 39-43) discusses SOMAH's incentive structure and requires that, "Under the structure adopted here, incentive levels will decrease by the annual percent decline in residential solar costs as reflected by NREL reports, or 5% annually, whichever is less."

Following Decision 17-12-022, the SOMAH PA examined changes in the cost of residential solar energy systems from 2017 and 2018, the most recent years available for the technical report series entitled, "U.S. Solar Photovoltaic System Cost Benchmark" produced by the National Renewable Energy Laboratory (NREL).

Based on the analysis, the SOMAH PA [calculated a required incentive step-down](#) of 5% for the program year spanning July 1, 2020, through June 30, 2021. Figure 20 provides incentive values for SOMAH's second program year below.

Figure 20 – Year 1 and Year 2 Incentive Rates

| Tax Credits | | \$ per AC Watt Incentive | | | |
|-------------|-------|--------------------------|---------------|-----------|---------------|
| ITC | LIHTC | Tenant | | Common | |
| | | 2019-2020 | 2020-2021 | 2019-2020 | 2020-2021 |
| No | No | \$3.20 | \$3.04 | \$1.10 | \$1.04 |
| Yes | No | \$2.25 | \$2.14 | \$0.80 | \$0.76 |
| No | Yes | \$2.25 | \$2.14 | \$0.80 | \$0.76 |
| Yes | Yes | \$1.60 | \$1.52 | \$0.60 | \$0.57 |



The SOMAH PA also acknowledges that the California Solar & Storage Association, Brightline Defense Project and Sunrun Inc. submitted a petition for modification of [Decision 17-12-022](#) on May 13, 2020, related specifically to the matter of SOMAH's incentive step-down. The SOMAH PA will await the CPUC's direction in taking any action other than what has already been prescribed in the Decision.

5. Conclusions

Since its launch on July 1, 2019, the SOMAH program continues to be well on track to reach the program's 300 MW goal. While a high volume of applications received in the first months of the program resulted in waitlists for three utility territories, application processing and additional funding for all IOU territories released in February 2020 resulted in all waitlists being cleared except for SDG&E, which was substantially reduced. SDG&E's waitlist remains closed at this time due to the high number of applications on the waitlist, though continual application processing and new funding is expected to make continued progress moving additional applications off the SDG&E waitlist.

In this reporting period, the COVID-19 public health crisis required the SOMAH PA to adapt to unforeseen challenges in program administration and manage for related uncertainty. The SOMAH PA spent most of Q2 2020 striving to assess, understand and address the impacts and challenges that key SOMAH audiences and stakeholders were facing (and continue to face) due to COVID-19. Through surveys, public forum listening sessions and ad hoc meetings with the SOMAH Advisory Council and JTO Task Force, the SOMAH PA made temporary adjustments, rather than waivers, to program requirements, provided program area-specific guidance and compiled health and safety resources for program participants to help mitigate impacts and maintain access and participation.

COVID-19 policies and restrictions have impacted ME&O activities for this reporting period and continue to impact activities for the foreseeable future. All in-person outreach continues to be suspended, with current outreach being conducted in strictly digital or print formats. The challenge of not being able to conduct in-person outreach was amplified by property owners' and tenants' limited capacity and appetite for engaging in conversations about SOMAH in the first several months of the public health crisis. Both property owners and tenants continue to grapple with the economic and public health impacts of COVID, while trying to track and monitor relevant policies affecting them and their communities. It is difficult to predict how tenant and property



owner capacity to engage in conversations about SOMAH and advocate for program participation will fluctuate or change in the coming reporting period. The SOMAH PA continues to adjust its messaging and strategies in order to maintain participation and share the benefits of SOMAH with diverse populations.

Despite the uncertainty and impacts of COVID-19, the SOMAH PA remains committed to serving disadvantaged and low-income communities and achieving its program goals around expanding contractor participation and diversity, robust job trainee participation, tenant education and savings and application pipeline diversity. To achieve this, the SOMAH PA continues to optimize and streamline aspects of the program to increase access and participation. This includes updating the program handbook and exploring program design elements such as progress payments that can potentially help achieve these goals. The SOMAH PA also continues to fortify its relationships and work collaboratively with its partners and stakeholders including contractors, property owners, CBOs, SOMAH AC, JTO Task Force, IOU representatives, CPUC commissioners and staff and other stakeholders to maintain program success and adapt to unforeseen challenges.

Looking ahead, the SOMAH PA will continue working closely with the third-party evaluators through Phase II of the evaluation — developing surveys and aligning on evaluation metrics, strategies and methodologies to ensure collection of key information to evaluate program effectiveness and measure successes. As projects progress through the 18-month reservation period, the SOMAH PA looks forward to collecting and reporting on more information for installed and interconnected projects.



6. Appendix A

As referenced in Section 3.1.1, Application and Incentive Statistics, below is the description of PowerClerk statuses referenced.

Upfront Technical Assistance

- **Upfront Technical Assistance Approved:** Applicant has entered the required information and uploaded the reservation request documentation for review.

Reservation Request Milestone

- **Reservation Request Submitted:** Applicant has entered the required information and uploaded the reservation request documentation for review.
- **Reservation Request Review:** Reservation request is in queue for review by the Program Administrator.
- **Pending QA – Reservation Request:** Reservation request is under final review by the Program Administrator.
- **Suspended – Reservation Request:** Errors were found during reservation request review and require corrections by the applicant. The Program Administrator sent correction information via email from the PowerClerk portal.
- **Resubmitted – Reservation Request:** The reservation request has been resubmitted with corrections and is in queue for review by the Program Administrator.
- **Pending Data Request:** The application is in queue to be sent to the IOUs for electric usage data request.
- **Pending IOU Data:** Electric usage data has been requested from the IOU.
- **Processing IOU Data:** Electric usage data has been received and is under review by the Program Administrator.
- **Pending Application Deposit:** Reservation request is free of errors and pending receipt of the application deposit before moving to reservation approved status.
- **Reservation Approved:** Reservation request requirements have been met and the application deposit has been received. The project's funding will be reserved for 18 months, starting from the reservation approval date.

Energy Efficiency Compliance Milestone

- **Energy Efficiency Compliance Milestone Review:** Energy Efficiency Compliance Milestone is under review by the Program Administrator.



- **Energy Efficiency Compliance Milestone Approved:** Energy Efficiency Compliance Milestone requirements have been met.
- **Suspended – Energy Efficiency Compliance Milestone:** Errors were found during Energy Efficiency Compliance Milestone Review and require corrections by the applicant. The Program Administrator sent correction information via email from the PowerClerk portal.

Waitlist

- **Waitlist:** Applicant has entered the required information and uploaded the Technical Assistance Request Form or reservation request documentation for Program Administrator review in a fully subscribed program.

Other statuses

- **Canceled:** The application is no longer eligible due to missing a deadline or project requirement. The project can be resubmitted with a new application at the current incentive rate.
- **Withdrawn:** Host customer or applicant requested that the application be removed and permanently marked with the inactive, withdrawn status. Withdrawn applications are moved to canceled status after 14 days.